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Coffee Semi-annual

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Report Highlights:

Post forecasts for MY 2011/2012 a production increase to 20.6 million 60 kg-bags (equivalent to 1.24 MMT). The rainy season continued until the end of November, which delayed the coffee harvest. Post expects that new-crop coffee will be ready in the local market from the second week of December.

According to official data from Vietnam's General Statistics Office, in MY 2010/2011, Vietnam exported 1.232 million metric tons (MMT) of all types of coffee products, valued at a record \$2.6 billion. This is an increase of 6 percent in volume and 56 percent in value over MY 2009/2010 due, in part, to high global prices. Specifically, green coffee bean exports totaled 15.3 million 60kg-bags or 920 thousand metric tons (TMT), a 7-percent drop in volume, but a 37-percent increase in value, compared with the MY 2009/2010. Green coffee export value reached a record of about \$2 billion, thanks to high global coffee prices.

Executive Summary:

Despite the Government of Vietnam's (GVN) efforts to maintain the coffee growing area at 500,000 hectares (ha), area has continued to expand. According to the GVN General Statistic Office (GSO), production area has increased about 10 percent over the past five years to about 550,000 ha. According to the Vietnam Coffee & Cocoa Association (Vicofa), in Vietnam's Central Highlands about 137,000 ha of old and low-quality coffee trees need to be replaced over the next five years. This represents about 25 percent of the total current production area. In order to reach this total in five years, about 28,000 ha will need to be replanted each year. This process will require at least 28-30 million new breeding saplings. Post forecasts for MY 2011/2012 a production increase to 20.6 million 60 kg-bags (equivalent to 1.24 MMT). Post forecasts that higher yields due to better production practices will offset the drop in production from the recently replaced area.

Commodities:

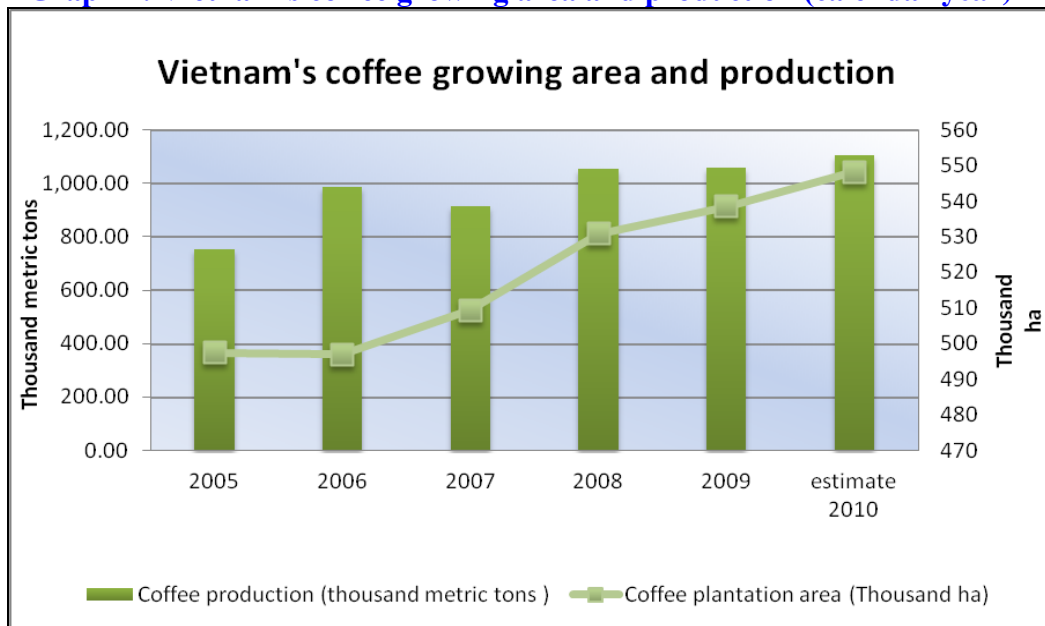
Coffee, Green

Production:

Rainy season continued until the end of November. It normally stops in October in Vietnam's coffee producing heart – the Central Highlands. The rainy weather has delayed the coffee harvest and newly harvested coffee beans have yet to arrive on the market. Post expects that new-crop coffee will be ready in the local market from the second week of December.

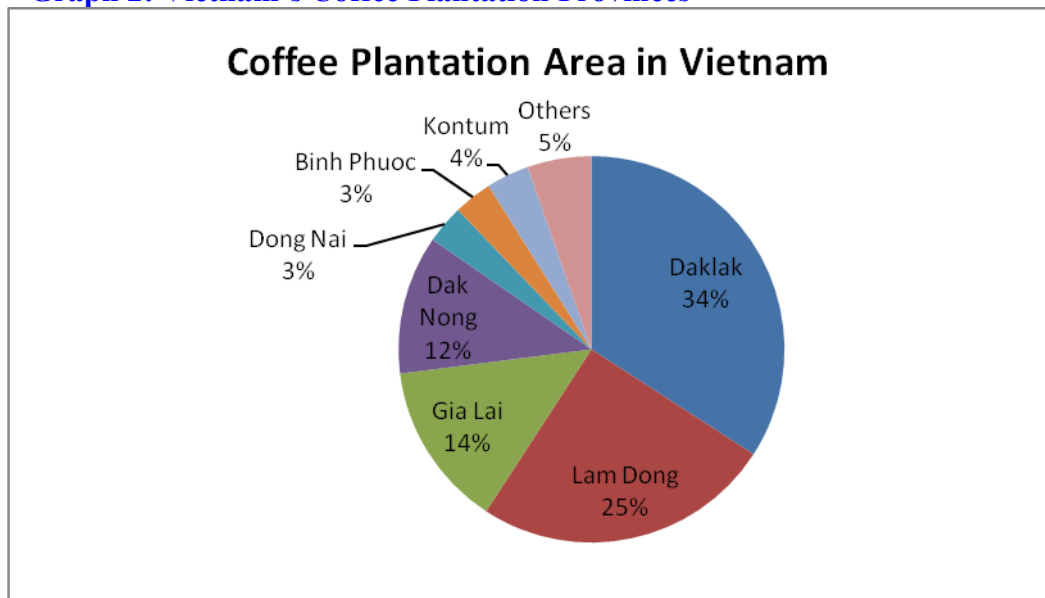
Despite the Government of Vietnam's (GVN) efforts to maintain the coffee growing area at 500,000 hectares (ha), area has continued to expand. According to the GVN General Statistic Office (GSO), production area has increased about 10 percent over the past five years to about 550,000 ha. (see graph 1; graph 2).

Graph 1: Vietnam's coffee growing area and production (calendar year)



Source: General Statistic Office (GSO)

Graph 2: Vietnam's Coffee Plantation Provinces



Source: Vietnam Ministry of Agriculture and Rural Development (MARD)

According to the Vietnam Coffee & Cocoa Association (Vicofa), in Vietnam's Central Highlands about 137,000 ha of old and low-quality coffee trees need to be replaced over the next five years. This represents about 25 percent of the total current production area. In order to reach this total in five years, about 28,000 ha will need to be replanted each year. This process will require at least 28-30 million new breeding saplings.

According to the Tay Nguyen Agriculture and Forestry Science Institute, intercropping offers an option to keep some income flowing during the years when the new trees are maturing. Possible intercrop trees include macadamia and avocado, which should be planted in a coffee field about three years before the cutting and replacement of the old and low quality coffee trees. In the fourth year, the macadamia and avocado trees should have fruit and will help to supplement farm income while the new coffee trees are becoming mature. This strategy could become important if coffee growers are not provided financial support from the GVN to assist with replacing older coffee plants.

Post forecasts a production increase for MY 2011/2012 to 20.6 million 60 kg-bags (equivalent to 1.24 MMT). Post forecasts that yields from better production practices, including more inputs, will offset the drop in production from the recently replaced area.

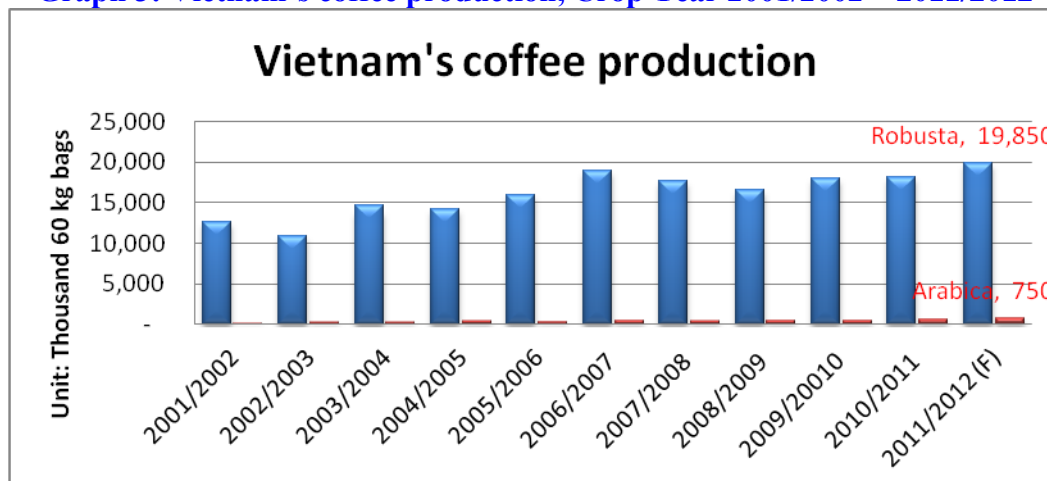
Table 1: Coffee Production by Marketing Year (Oct.-Sept.)

	2009/2010	2010/2011	2011/2012 estimate
Marketing year begins	10/2009	10/2010	10/2011
Production (green bean, thousand tons)	1,110	1,125	1,236
Average coffee yield (tons/ha)	2.07	2.1	2.2

Source: Post estimates

According to the Ministry of Agriculture and Rural Development (MARD), Arabica production will likely be about 750,000 bags (60 kg-bags) in MY 2011/2012. This would be a 25 percent increase over MY 2010/2011. Production is centered in the provinces of Son La and Lam Dong. Note: Arabica coffee accounts for only 3 percent of the total coffee production in Vietnam (see graph 3). Although the production area for Arabica is slowly expanding and yields are improving, Post still does not expect Arabica production to surpass the 5 percent threshold in the next five years.

Graph 3: Vietnam's coffee production, Crop Year 2001/2002 – 2011/2012



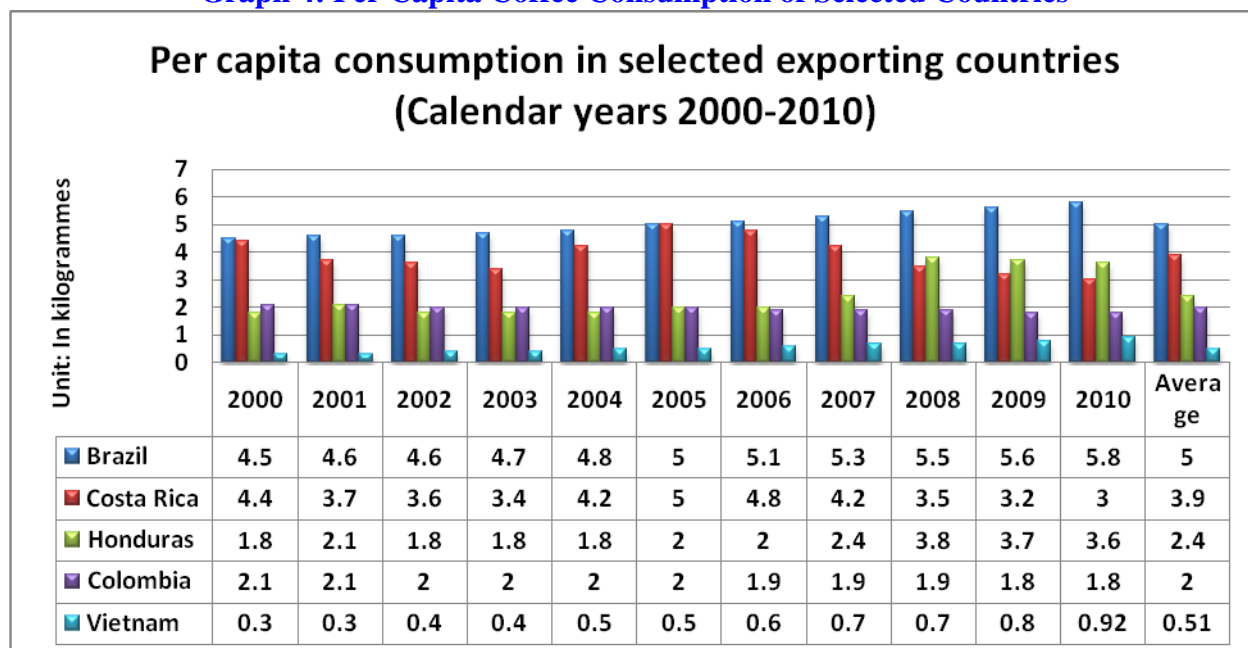
Source: USDA, Post estimates

Consumption:

Post revises its estimate for domestic consumption in MY 2010/2011 to 1.3 million 60 kg bags, or 80 thousand metric tons (TMT) green bean equivalent (GBE). Post forecasts domestic consumption in MY 2011/2012 at 1.5 million 60 kg bags, or 90 TMT GBE, a level equal to about 7 percent of total production. Vietnam's current per capita coffee consumption is about 0.92 kg/person. Although increasing, it is still considerably lower than other producing countries (see Graph 4).

In recent years, Vietnam's domestic coffee consumption has grown significantly. Many new cafes have opened including Western style cafés (Highland Coffee, Gloria Jean's Coffees, Lee's Coffee) and Vietnamese style cafes (Trung Nguyen, S-café). Many internet cafes, bookstore cafes, and new, non-traditional venues are opening and have become popular with both 16-22 year olds and businesspeople alike, providing more options for consumers of different age categories. The population growth rate of 1 percent per year (equal to about one million people) also contributes to the increase in domestic coffee consumption.

Graph 4: Per Capita Coffee Consumption of Selected Countries



Source: International Coffee Organization (ICO); Post estimate

Domestic marketers are providing domestic consumers a wide range of roasted, ground, and instant coffee products to meet increasing demands for time-saving and convenient products. Additionally, alternative coffee brewing methods such as mochas, cappuccinos, and espressos have been introduced through Western Cafés to the local consumers. Canned coffee (liquid coffee) is becoming more popular in Vietnam due to its convenience and ease of distribution and preservation (see photo 1, 2, 3).

Photo 1, 2, 3: Coffee products available in supermarkets in Hanoi

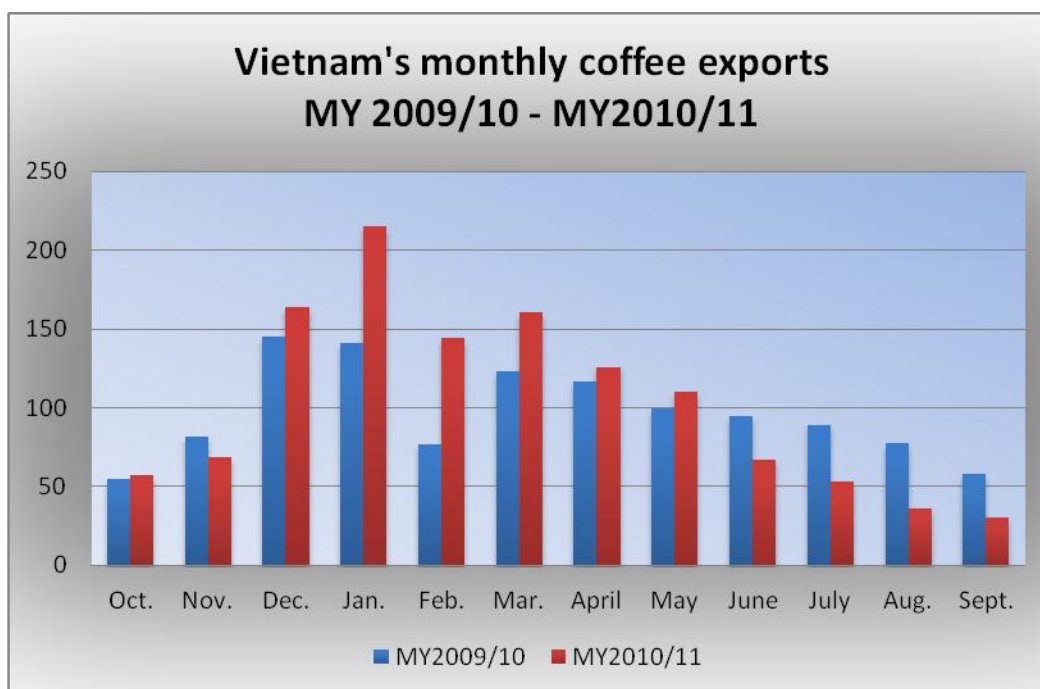


Source: FAS Vietnam

Trade: Exports

According to official data from Vietnam's General Statistics Office, in MY 2010/2011, Vietnam exported 1.232 million metric tons of all types of coffee products, valued at a record \$2.6 billion. This is an increase of 6 percent in volume and 56 percent in value over MY 2009/2010 due, in part, to high global prices (see Graph 5, Table 2).

Graph 5: Vietnam's Monthly Coffee Exports, MY2009/2010 – MY 2010/2011



Source: GVN General Statistics Office (GSO)

Table 2: Vietnam's Monthly Coffee Product Exports (All Types), MY 2008/2009 – MY 2010/2011

Month	2008/2009 (Begin: Oct. 2008)		2009/2010 (Begin: Oct. 2009)		2010/2011 (Begin: Oct. 2010)		% Change MY2010/2011 over MY 2009/10	
	Volume (TMT)	Value (\$ million)	Volume (TMT)	Value (\$ million)	Volume (TMT)	Value (\$ million)	Volume	Value
Oct.	39	71	55	79	57	97	4%	23%
Nov.	71	121	82	115	69	120	-16%	4%
Dec.	130	221	145	202	164	292	13%	45%
Jan.	136	210	141	198	215	414	52%	109%
Feb.	153	234	77	110	144	303	87%	175%
Mar.	136	199	123	168	161	365	31%	117%
April	124	180	117	159	126	302	8%	90%
May	92	132	100	141	110	270	10%	91%
June	78	115	95	137	67	157	-29%	15%
July	53	76	89	138	53	124	-40%	-10%
Aug.	54	77	78	123	36	83	-54%	-33%
Sept.	48	71	58	93	27	61	-53%	-34%
Grand Total	1,114	1,707	1,160	1,663	1,229	2,588	6%	56%

Source: General Statistics Office (GSO)

According to trade data from the General Customs Office, Vietnam exported 15.3 million 60kg-bags or 920 TMT of green coffee beans in MY 2010/2011 (October – September), a 7-percent drop in volume, but a 37-percent increase in value, compared with the previous marketing year (see Table 3). Green coffee export value reached a record of about \$2 billion, thanks to high global coffee prices.

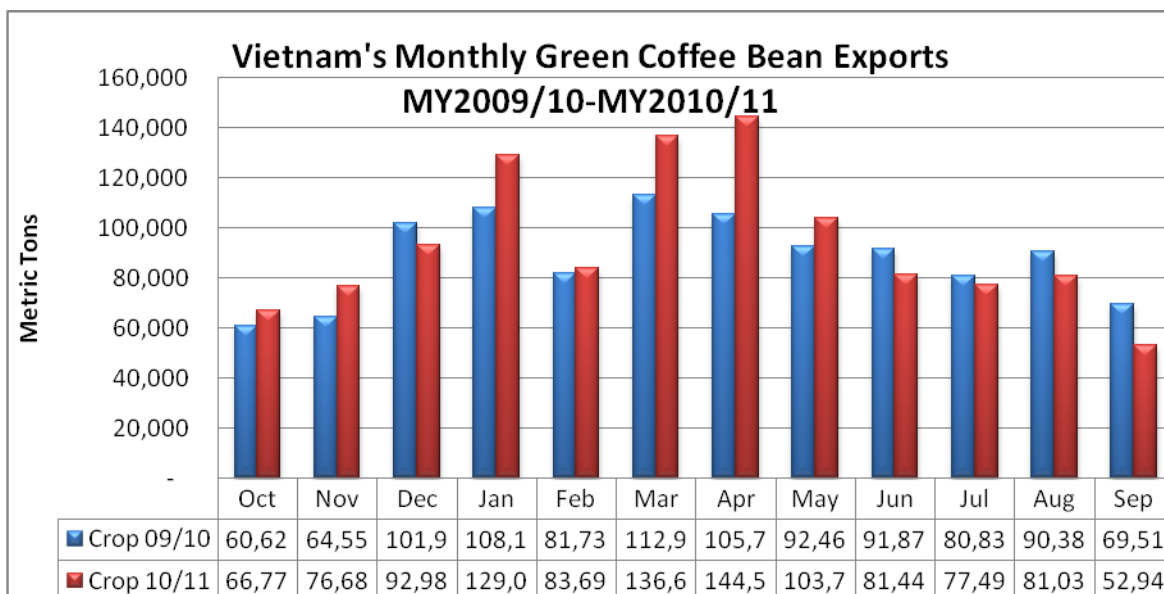
Table 3: Vietnam's Green Coffee Bean Exports, MY 2008/2009 – MY 2010/2011

Month	2008/2009 (Begin: Oct. 2008)		2009/2010 (Begin: Oct. 2009)		2010/2011 (Begin: Oct. 2010)		% Change MY2010/2011 over MY 2009/10	
	Volume (TMT)	Value (\$ million)	Volume (TMT)	Value (\$ million)	Volume (TMT)	Value (\$ million)	Volume	Value
Oct.	34	60	52	74	49	85	-6%	15%
Nov.	63	106	70	100	62	109	-11%	9%
Dec.	159	262	114	160	113	203	0%	27%
Jan.	118	182	112	158	136	267	21%	69%
Feb.	119	181	64	92	94	197	47%	114%
Mar.	110	158	104	142	147	333	41%	135%
April	103	149	102	137	100	240	-2%	75%
May	69	100	78	111	77	188	-1%	69%
June	64	93	79	114	53	124	-33%	9%
July	44	63	81	124	40	95	-51%	-23%
Aug.	49	70	69	110	31	71	-55%	-35%
Sep.	45	65	65	106	18	41	-72%	-61%
Grand Total	977	1,489	989	1,426	920	1,953	-7%	37%

Source: Global Trade Atlas; *General Customs Office

However, according to MARD's shipment statistics, in MY 2010/2011, Vietnam exported 18.78 million 60kg-bags or 1.127 million metric tons of green coffee beans, a 6-percent increase over the previous marketing year (17.7 million 60 kg bags or 1.061 million metric tons) (see Graph 6).

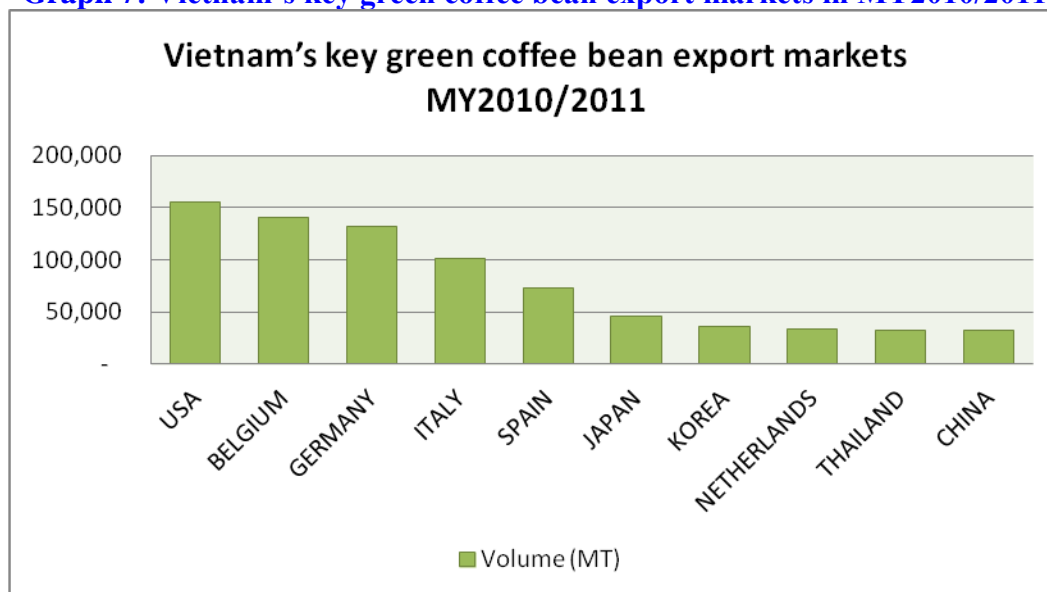
Graph 6: Vietnam's Monthly Green Coffee Bean Exports, MY2009/2010 – MY 2010/2011



Source: MARD

Vietnam exported coffee beans to 79 countries worldwide in MY 2010/2011. Among these countries, the top ten markets accounted for about 69 percent of total Vietnamese green coffee bean exports. The United States has become the largest importer of Vietnamese green coffee beans over the past three marketing years (see Graph 7, Table 4).

Graph 7: Vietnam's key green coffee bean export markets in MY2010/2011



Source: MARD

Table 4: U.S. Coffee Product Imports from Vietnam

Product	2009 (Oct.- 08-Sept. 09)		2010 (Oct. 09-Sept. 10)		2011 (Oct. 10-Aug. 11)	
	Value ('000 \$)	Qty (MT)	Value ('000 \$)	Qty (MT)	Value ('000 \$)	Qty (MT)
Coffee, Not Roasted (HS code 090111)	238,310	153,782	319,938	211,379	417,172	182,665
Coffee, Not roasted Def (HS code 090112)	4,774	2,899	7,070	3,939	22,039	7,282
Coffee, Roasted (HS code-090121)	2,283	511	2,033	644	3,046	796
Coffee, Roasted, Def (HS code 090122)	635	166	1,129	395	4,844	1,500
Coffee Husks and skins (HS code 090190)	11	5	7	1.7	11	2.2
Coffee Extracts, Instant coffee (HS code 2101)	4,093	1,245	4,284	1,378	6,733	1,926

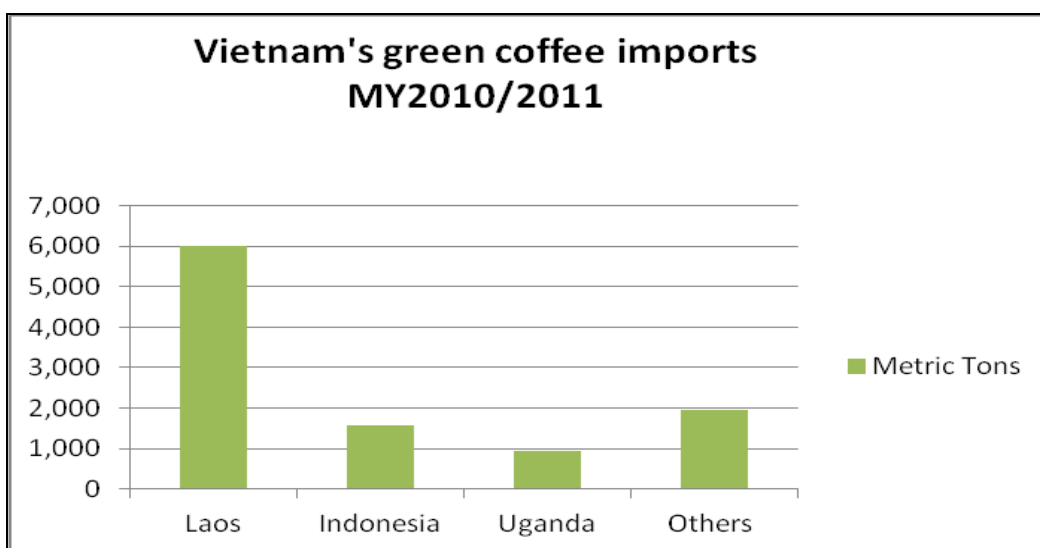
Source: Department of Commerce, U.S. Census Bureau, Foreign Trade Statistics

Vietnam continues to export ground, roasted and soluble coffee. For example Trung Nguyen's G7 brand coffee just entered the U.S. and South Korea markets. Vicofa believes that Vietnam should continue to invest in the production of more value-added coffee products to meet growing demand in emerging markets. Currently, the largest markets of both Vietnamese ground, roasted, and soluble coffee products are Belgium, Thailand, and Germany, with a total value of about \$24 million, \$20 million, and \$19 million, respectively, in MY 2010/2011. China and other countries in the Association of Southeast Asia Nations (ASEAN) are also Vietnam's emerging markets for ground, roasted, and instant coffee products.

Imports

Vietnam continues to import small quantities of green coffee, roasted, and instant coffees. According to trade data from the General Customs Office, total green bean coffee imports including both Arabica and Robusta for MY 2010/2011 were 175 thousand 60-kg bags, or about 10.5 TMT-GBE, a 243-percent increase over the previous marketing year (3 TMT) with a value of \$26 million, mainly from Laos and Indonesia (see Graph 8).

Graph 8: Vietnam's green coffee imports in MY2010/2011



Source: General Customs Office

PRICES

Export prices

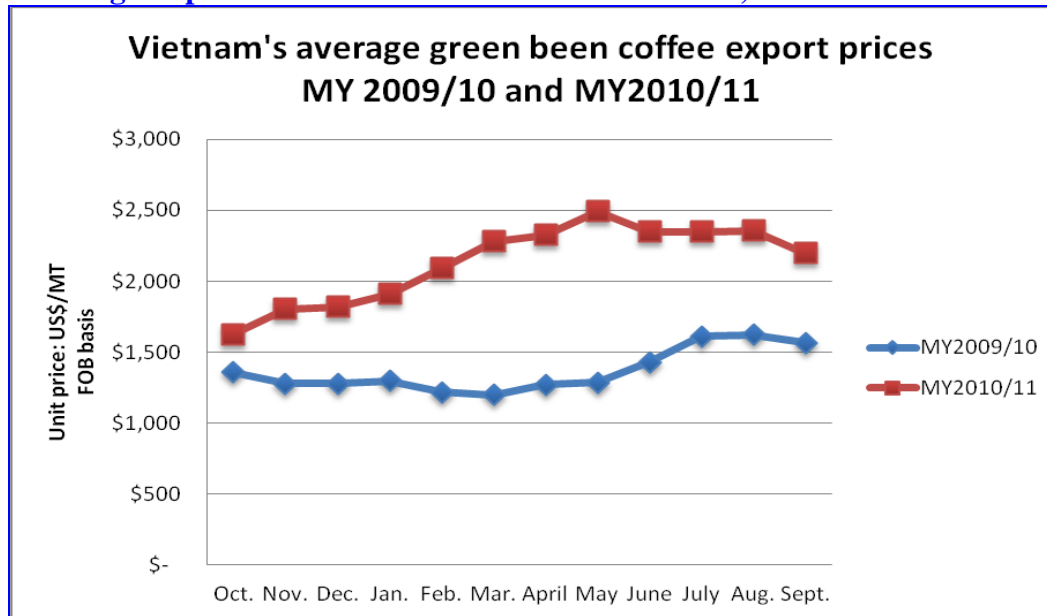
The average export price of Vietnam's Robusta coffee beans in MY 2010/2011 was \$2,134/MT (FOB Ho Chi Minh City basis), which is a 56-percent increase over the previous marketing year (\$1,368/MT) (see Table 5, Graph 9). This price was the highest in the last 16 years, but it was below the record set in MY 1994/1995 (\$2,658/MT) (see Graph 10). The increase in price can be attributed to low world stocks and growing global demand.

Table 5: Average Monthly Export Prices for Vietnamese Green Coffee, MY 2009/2010 – MY 2010/2011

FOB HCMCity basis price for common ungraded coffee beans (US\$/MT)	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sept.	Average export price for MY (Oct.-Sept.)
MY2009/10	1,357	1,278	1,277	1,297	1,218	1,198	1,271	1,286	1,431	1,610	1,622	1,566	1,368
*MY2010/2011	1,625	1,806	1,821	1,910	2,093	2,281	2,328	2,492	2,350	2,351	2,357	2,197	2,134
% change MY2010/2011 over MY2009/10	20%	41%	43%	47%	72%	90%	83%	94%	64%	46%	45%	40%	56%

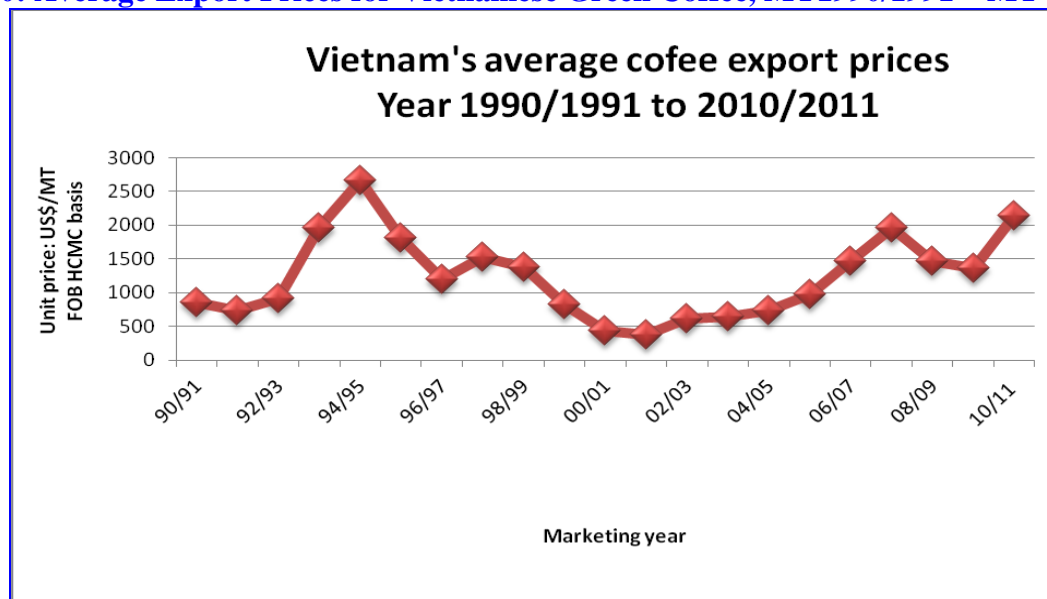
*Source: Dak Lak Trade, Investment & Tourism Promotion Center (Daktip); *Vicofa and BCEC*

Graph 9: Average Export Prices for Vietnamese Green Coffee, MY2009/2010 – MY 2010/2011



Source: Daktip; Vicofa and BCEC

Graph 10: Average Export Prices for Vietnamese Green Coffee, MY1990/1991 – MY 2010/2011



Source: Daktip; Vicofa and BCEC

Domestic prices

Vietnam's average domestic coffee price for Robusta common ungraded coffee beans in MY 2010/2011 moved in-line with the increases of coffee prices in the global market.

Table 6: Average domestic prices for Robusta coffee beans in Major Coffee Growing Provinces in MY2010/2011

Common coffee beans (VND/kg)	Oct. 2010	Nov. 2010	Dec. 2010	Jan. 2011	Feb. 2011	Mar. 2011	Apr. 2011	May 2011	June 2011	July 2011	Aug. 2011	Sept. 2011	Ave price for MY2010/2011
Dak Lak	30,210	34,180	35,390	37,730	42,630	46,410	47,220	49,960	49,730	48,370	48,470	46,230	43,044
Lam Dong	30,210	34,190	35,380	37,720	42,440	46,270	47,120	49,860	49,630	48,270	48,360	46,130	42,965
Gia Lai	30,160	34,050	35,260	37,690	42,440	46,330	47,200	49,860	49,630	48,270	48,360	46,130	42,948
Dak Nong	30,160	34,070	35,310	37,780	42,770	46,460	47,280	49,960	49,730	48,360	48,470	46,230	43,048

Source: Vicofa, Buon Ma Thuot Coffee Exchange Center (BCEC)

Exchange rates: US\$1 = VND 20,708 as of Oct. 17, 2011; US\$1 = VND 21,011 as of Nov. 1, 2011

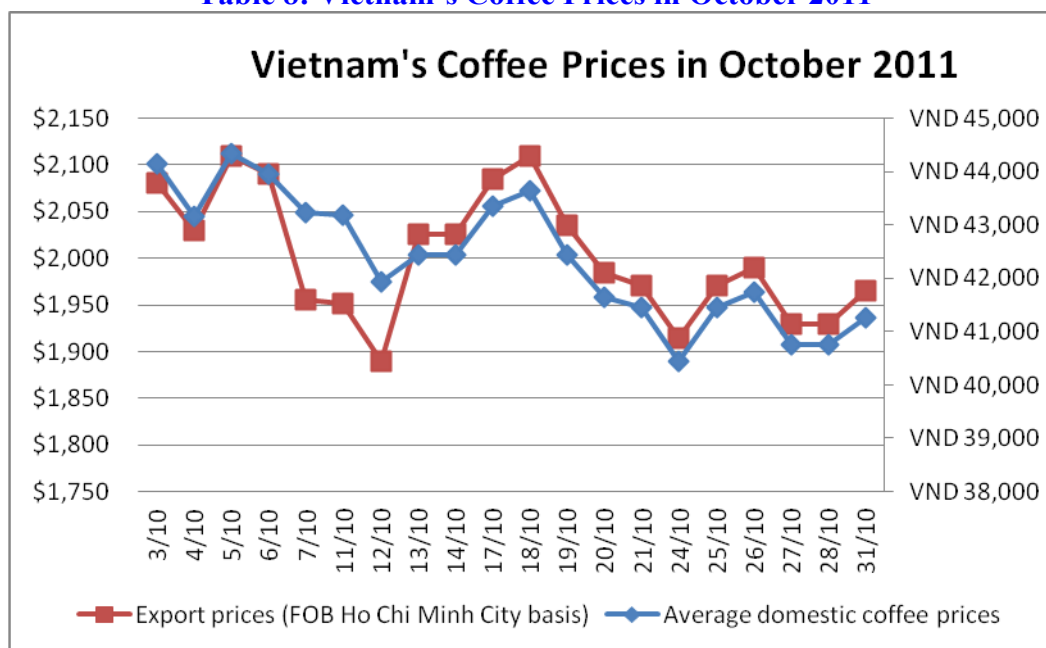
(Source: State Bank of Vietnam)

Table 7: Average Prices for Robusta Beans in Dak Lak Province (MY 2008/2009-2010/2011)

Month	Common Coffee Bean			
	MY 08/09 (VND)	MY 09/10 (VND)	MY 10/11* (VND)	Changes MY 10/11 over MY 09/10 (%)
October	23,400	24,400	30,210	24%
November	25,700	24,100	34,190	42%
December	24,800	24,200	35,390	46%
January	25,300	24,000	37,730	57%
February	25,200	23,200	42,630	84%
March	24,200	23,300	46,410	99%
April	24,800	24,300	47,220	94%
May	25,000	24,300	49,960	106%
June	24,100	26,000	49,730	91%
July	24,400	29,400	48,370	65%
August	24,500	29,300	48,470	65%
September	24,900	29,200	46,230	58%
Average price for MY	24,692	25,475	43,045	69%

Source: Dak Lak Trade, Investment & Tourism Promotion Center (Daktip); *Vicofa and BCEC

Table 8: Vietnam's Coffee Prices in October 2011



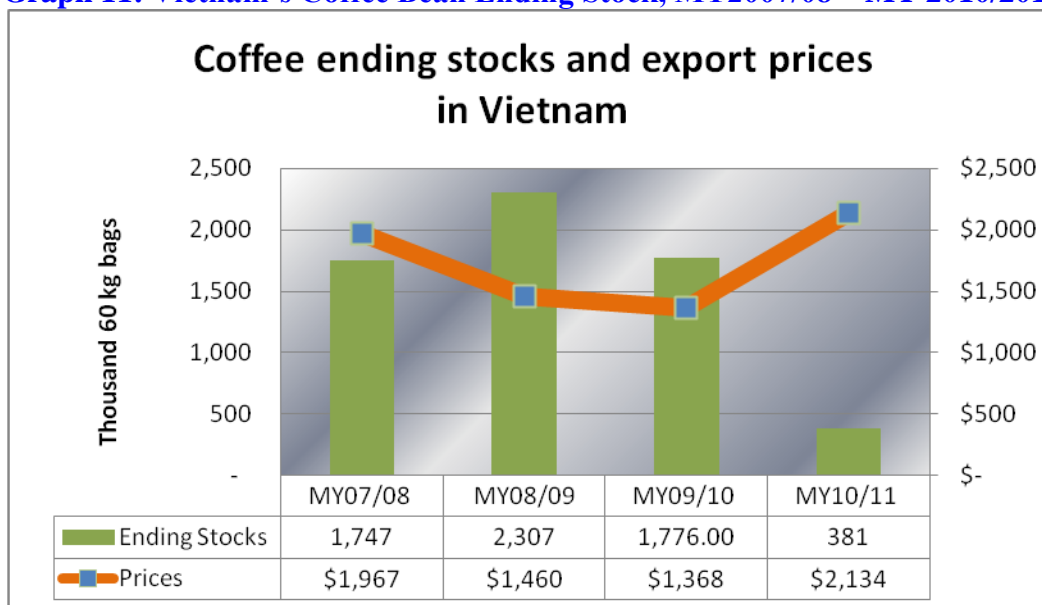
Source: Buon Ma Thuot Coffee Exchange Center (BCEC)

Stocks:

According to local traders, coffee growers have been selling almost all of their coffee beans due to high prices, and they are currently holding very limited on farm stocks. Therefore, Post revises MY 2011/2012 coffee carry-in stocks lower to 381 thousand 60kg-bags, or about 23 thousand MT-GBE accordingly. Local traders said that the exports in October and November would come from exporters' stocks and bonded warehouses of foreign trading houses, and local exporters have very little warehouse stock.

Vicofa recently asked GVN to provide support in the form of preferential loans for the stockpiling of 300,000 MT of coffee beans in the new crop year 2011/2012.

Graph 11: Vietnam's Coffee Bean Ending Stock, MY2007/08 – MY 2010/2011



Source: USDA; Vicofa and BCEC

Policy:

GVN approved \$3 million project to produce coffee, cocoa seeds and saplings

The Ministry of Agriculture and Rural Development has approved a project which aims to support the production of coffee and cocoa seeds and saplings. The VND 66.2 billion (US \$3.17 million) project in the 2011-2015 period, to be carried out by the Western Highlands Agro-Forestry Scientific and Technical Institute, is expected to supply 23 tons of good quality coffee seeds and two million coffee saplings per year.

Vicofa lobbies government for preferential loans for local exporters

Local coffee exporters in Vietnam recently proposed through Vicofa to the GVN to receive preferential loan rates for the purchase of domestic coffee. Currently local companies are charged more than 20 percent interest while foreign competitors are only charged around 3.5 percent. Vicofa also asked authorities in coffee growing provinces to clamp down on foreign businesses setting up “illegal buying networks”. However, it is likely that these measures will only be temporary since Vietnam will soon fully open its coffee market to foreign wholesalers in accordance with its World Trade Organization (WTO) commitments. Vicofa reported that the volume of coffee beans currently bought by foreign companies accounts for 60 percent of the total coffee beans sold in the local market.

GVN drafts better regulations for coffee export and trading

Recently MARD and the Ministry of Industry and Trade (MOIT) drafted regulations covering coffee trading and exporting conditions to encourage the development of Vietnam's sustainable coffee industry. According to the draft rule, the most important conditions that each exporter should meet are: (1) the export of at least 5,000 tons per year for two consecutive years, (2) possession of warehouses, (3) capability to process at least 5,000 tons per year; and (4) maintain a system of transparent finances.

About 40 percent of coffee companies in Vietnam can meet these conditions, according to VICOFA.

Currently, there are more than 150 coffee exporters; VICOFA and the GVN think this is too many. Post expects the new rule to be officially issued, approved, and implemented before the end 2012.

Marketing:

INDUSTRY ACTIVITIES

Vicofa signs cooperation agreements with local banks to support Vietnam's coffee industry

Recently, Vicofa signed cooperative agreements with local banks to support Vietnam's coffee industry for the new coffee crop. Banks, including Agribank and Techcombank, agreed to allocate adequate budgets for the purchase of new crop coffee. Agribank committed to allocate approximately VND 5,000 billion (about \$250 million) and Techcombank committed to allocate VND 2,000 billion (about \$100 million) for the coffee industry. Post does not expect this increased access to capital to have much impact on the structure of the industry in Vietnam. The large international companies will continue to dominate the domestic purchasing of coffee.

Group of 20 local exporters agree to stockpile about 300,000 MT of coffee beans in new crop year

According to Vicofa, the group of 20 local leading exporters (G20) recently agreed to stockpile about 300,000 MT of coffee beans in the new crop year in order to control supply in the local market. Vicofa hopes this supply will help to mitigate the impact of price fluctuations. In addition, other members of Vicofa intend to stockpile about 425,000 MT of coffee beans.

Vietnamese coffee brand, G7, sells for first time in US and Korean supermarket stores

According to Trung Nguyen Coffee Company, its G7 instant coffee brand is the first Vietnamese coffee brand to be sold in the U.S. and in South Korea. It is carried by Costco and E-mart stores, respectively. The first order from Costco of 100 containers, and from E-mart of 15 containers, will be delivered in December 2011.

Vietnam's largest coffee growing province Dak Lak to sue Chinese Company for Buon Ma Thuot Coffee Brand

Currently, a Chinese Company -- the Guangzhou Buon Ma Thuot Coffee Limited Company -- uses the Buon Ma Thuot Coffee Brand in China. The People's Committee of the Dak Lak province in the Central Highlands authorized the Buon Ma Thuot Coffee Association to file a claim for the revocation of the protected Buon Ma Thuot coffee brand name in China. The Association will also represent the province to register for the protection of a collective "Buon Ma Thuot Coffee" brand name in accordance with the Madrid Agreement Concerning the International Registration of Marks.

Production, Supply and Demand Data Statistics:

Table 9: Vietnam's Coffee Production, Supply and Demand (PSD)

Coffee, Green Vietnam	2009/2010		2010/2011		2011/2012	
1000 HA, MILLION TREES, 1000 60 KG BAGS	Market Year Begin: Oct 2009		Market Year Begin: Oct 2010		Market Year Begin: Oct 2011	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	536	0	0	0	0	0
Area Harvested	504	0	0	0	0	0
Bearing Trees	629	0	0	0	0	0
Non-Bearing Trees	80	0	0	0	0	0
Total Tree Population	709	0	0	0	0	0
Beginning Stocks	2,307	2,308	1,140	1,776	895	381
Arabica Production	450	450	575	585	675	750
Robusta Production	18,050	18,050	18,150	18,165	19,925	19,850
Other Production	0	0	0	0	0	0
Total Production	18,500	18,500	18,725	18,750	20,600	20,600
Bean Imports	50	51	80	175	125	185
Roast & Ground Imports	0	1	0	1	0	1
Soluble Imports	25	25	25	25	25	25
Total Imports	75	77	105	201	150	211
Total Supply	20,882	20,885	19,970	20,727	21,645	21,192
Bean Exports	18,425	17,679	17,550	18,783	19,000	19,000
Rst-Grnd Exp.	50	50	50	50	50	50
Soluble Exports	195	180	275	180	300	250
Total Exports	18,670	17,909	17,875	19,013	19,350	19,300
Rst,Ground Dom. Consum	950	1,080	1,050	1,198	1,150	1,320
Soluble Dom. Cons.	122	120	150	135	175	180
Domestic Use	1,072	1,200	1,200	1,333	1,325	1,500
Ending Stocks	1,140	1,776	895	381	970	392
Total Distribution	20,882	20,885	19,970	20,727	21,645	21,192
Exportable Production	17,428	17,300	17,525	17,417	19,275	19,100

Source: USDA/FAS

Table 10: Green coffee export trade matrix MY09/10-MY10/11

Country	Vietnam		
Commodity	Coffee, Green		
Time Period	Oct.- Sept.	Units:	MT
Exports for:	2010		2011
U.S.	167,308	U.S.	155,235
Others		Others	
Germany	141,714	Belgium	139,984
Spain	87,247	Germany	132,422
Italy	72,897	Italy	101,311
Japan	47,727	Spain	73,459
Belgium	42,942	Japan	46,154
South Korea	30,406	South Korea	36,548
Philippines	29,958	Netherlands	33,377
United Kingdom	27,188	Thailand	32,726
Russia	25,998	China	31,925
Total for Others	515,075		783,141
Others not Listed	378,383		188,797
Grand Total	1,060,766		1,127,173

Source: MARD

Table 11: Green Coffee Import Trade Matrix for MY2009/2010-MY2010/2011 (Oct.-Sept.)

Country	Vietnam		
Commodity	Coffee, Green		
Time Period	Oct.-Sept.	Units:	MT
Imports for:	2010		2011
U.S.	0	U.S.	0
Others		Others	
Indonesia	844	Laos	6,015
Laos	819	Indonesia	1,577
Cote Devoir	257	Uganda	948
China	436		
Brazil	126		
Tanzania	73		
Total for Others	2,555		8,540
Others not Listed	507		1,949

Grand Total	3,062		10,489
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Sources: Vicofa; General Customs Office; General Statistics Office